

# IVFV5

## 2018 – 2019 Independent Verification Worksheet



Your 2018–2019 Free Application for Federal Student Aid (FAFSA) has been selected for a process called verification. Federal law requires that an institution verify certain information that has been listed within the FAFSA before federal aid can be disbursed. To complete the federal verification process, the financial aid office will compare the information that has been listed on your FAFSA to the information listed on this worksheet along with other documents submitted. If there are differences, your FAFSA information will need to be corrected.

### A. Student Information

Print: Last Name, First Name, M.I.

CofC ID

### B. Family Information

List the people in your household, including:

- Yourself and your spouse if you are married, and;
- Your children, if any, if you will provide more than half of their support from July 1, 2018, through June 30, 2019, or if the child would be required to provide your information if they were completing a FAFSA for 2018-2019. Include children who meet either of the standards, even if they do not live with you, and;
- Other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2018 through June 30, 2019
- Provide the name of the college or university (or mark N/A) that each family member will attend between July 1, 2018 and June 30, 2019. They must be enrolled in a college degree or certificate program, not post-secondary as a high school student.
- For clarification on who should be included in the household visit <http://www.finaid.org/educators/pj/householdsize.phtml>.

Full Name	Date of Birth	Relationship	College
		<b>Self (student)</b>	<b>College of Charleston</b>

### C. Student Tax Forms and Income Information

	<b>Check only one box below:</b>	<b>Must submit the following:</b>
<input type="checkbox"/>	I filed a 2016 Federal Income Tax Return.	Use the IRS Data Retrieval Tool within FAFSA on the web OR submit all pages of your 2016 IRS Tax Return Transcript.
<input type="checkbox"/>	I worked but I am NOT REQUIRED to file and will not file a 2016 Federal Income Tax Return.	1. Verification of Non-Filing Letter from the IRS is <u>REQUIRED</u> (see below for instructions). 2. Complete Student Non-Tax Filer form (see below for instructions).
<input type="checkbox"/>	I did NOT work in 2016 and will not file a 2016 Federal Income Tax Return. I was not required to file.	Verification of Non-Filing Letter from the IRS is <u>REQUIRED</u> (see below for instructions).
<input type="checkbox"/>	I corrected my 2016 Federal Income Tax Return using an Amended Return (Form 1040X).	1. Submit a signed copy of the Form 1040X filed with the IRS 2. Submit a 2016 IRS Tax Return Transcript (see page 2 for instructions).

## Detailed Instructions and Explanations: 2018-2019 FAFSA Verification Worksheet

1. The best way to verify income is by using the IRS Data Retrieval Tool option within your FAFSA. You may view an instructional video at <http://www.finaid.ucsb.edu/FAFSASimplification/step5.html>.
2. If you cannot use the IRS Data Retrieval Tool, you may obtain a Tax Return Transcript using these methods:
  - a. On-line or by mail at [www.irs.gov/Individuals/get-transcript](http://www.irs.gov/Individuals/get-transcript).
  - b. Order by phone: **1-800-908-9946**. Please note the IRS TAX RETURN TRANSCRIPT is the ONLY document that we can accept to verify tax return data.
3. If you DID NOT FILE a tax return:
  - a. You must complete the Student Non-Tax Filer form found on Financial Aid downloads form page @ <http://finaid.cofc.edu/download-forms/index.php>; and,
  - b. A Verification of Non-Filing Letter from the IRS is **REQUIRED** for those that did not file a 2016 IRS tax return. Request this letter by contacting the IRS at 1-800-908-9946 or [www.irs.gov/individuals/get-transcript](http://www.irs.gov/individuals/get-transcript).
4. If you intend to email your documents, in order to meet our security protocols, please mark out all but the last 4 of your social security number from all documents. If faxing, this is not necessary.

### D. High School Completion

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Check the box of the document you will attach to this worksheet:

- High school diploma or high school transcript including graduation date.
- Official documentation from high school counselor stating your graduation date and reason why high school diploma/ transcript is unavailable.
- General Education Development (GED) Certificate
- Academic transcript of a successfully completed two-year program acceptable for full credit toward a bachelor's degree.
- If you are a homeschooled student, a transcript or equivalent, signed by parent or guardian, listing secondary school courses you have completed and documentation that you have successfully completed secondary school education. If you are a homeschooled student, a secondary school completion credential provided under State law.
- If you do not have documentation meeting any of the above requirements, seeking an associate degree or its equivalent, and excelled academically in high school, you may provide documentation of the high school stating that you excelled academically in high school and documentation from your current/future postsecondary institution that you have met the formalized, written policies of admitting such students.

### E. Documentation of Identity/ Statement of Educational Purpose

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In order to complete the Verification process, you will need to appear in person at your postsecondary institution and present your government issued ID (such as a driver's license, passport, etc.) and this verification worksheet to an institutionally authorized financial aid administrator. Your financial aid administrator will need to validate the statement below at the time of submission by maintaining a copy of your photo ID and by providing a signature and date below. ***If you cannot appear in person to submit this worksheet, you will need to provide a copy of your government issued ID and this worksheet notarized by a public notary.***

#### Statement of Educational Purpose

I certify that I \_\_\_\_\_ am the individual signing this Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending the College of Charleston for 2018-2019.  
*Print student's name*

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Student's Signature and Date \_\_\_\_\_ Financial Aid Administrator Signature and Date \_\_\_\_\_

**Notary's Certificate of Knowledge**

State of \_\_\_\_\_ City/County of \_\_\_\_\_ on \_\_\_\_\_

Before me \_\_\_\_\_ personally appeared \_\_\_\_\_  
*Print notary's name* *Print name of signer*

And provided to me on basis of satisfactory evidence of identification \_\_\_\_\_  
*Government-issued ID. Do NOT use military ID*

To be the above named person who signed the foregoing instrument,

Witness my hand and official seal \_\_\_\_\_  
*Notary signature* *date commission expires* *seal*

## F. Sign This Worksheet

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Student <b>Electronic signatures are NOT acceptable.</b>	CofC ID	Date
Spouse (must sign if applicable) <b>Electronic signatures are NOT acceptable.</b>		Date

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Sign and date this worksheet and all required documents. You may submit the worksheet along with all required forms to:

Office of Financial Assistance and Veteran Affairs  
66 George Street Charleston, SC 29424  
P:843.953.5540 F:843.953.7192  
Email: [financialaid@cofc.edu](mailto:financialaid@cofc.edu)